

Instructional Guide: End-User Documentation Kit for Palm OS®5

Welcome to the *End-User Documentation Kit* instructional guide. The information in this guide shows you how to build customized end-user documentation for a device that is based on Palm OS software.

What is the End-User Documentation Kit?

The *End-User Documentation Kit* is a set of files and instructions that lets you build a set of customized documentation for your device. The kit is provided on the Palm OS 5 Product Development Kit (PDK) CD and includes:

- A master documentation set that includes front matter, a table of contents, and an index. It also includes individual chapters for standard operating procedures, Graffiti® writing, and each Palm OS basic application. For a description of the contents of each chapter, see “Contents of the End-User Documentation Kit” on page viii.
- The annotated template used to create the End-User Documentation Kit. This template gives tips on the how to best use the tags, and how to handle tables and graphics.
- An instructional file in PDF format (*Instruct.pdf*) that provides step-by-step instructions for building a set of customized documentation for your device (you are reading this file now).

Requirements

To use the End-User Documentation Kit, you need:

- Adobe FrameMaker 6.0
- Adobe Acrobat Reader 4.0 to open the *Instruct.pdf* file
- Helvetica and Palatino fonts (Type 1 or TrueType)
- An intermediate to advanced knowledge of Adobe FrameMaker, including how to generate, update, and rearrange book files; how to define variables and cross-references; and how to create index markers.

How does the End-User Documentation Kit work?

The End-User Documentation Kit contains all the basic information you need to build documentation for your product. To customize the documentation for your device, you will need to supply specific information about your product, and you will need to read and edit the documentation as appropriate for your product.

Within the individual chapters of this kit you will find variables, instructional notes, and suggestions to help you build your documentation. The following types of information is included in the chapters of the documentation kit:

- **Variables.** Variables are placeholders you replace with information specific to your product. Variables are displayed in red so they can be easily identified within the body of the text. Once you have assigned definitions to the variables in one chapter, simply import the variable definitions into the remaining chapters you plan to use for your documentation.
- **Template alerts.** Template alerts are messages, displayed in blue, that you should consider as you create your documentation. Once you have read and considered the information in a template alert, delete the alert.

Example:

Template Alert! (Delete this alert when completed): This is a sample of a template alert. Once you've considered and acted on the infor-

mation in the alert, triple-click to select the entire paragraph, then press Backspace or Delete to delete it from the chapter.

- **Illustration suggestions.** These are suggestions for adding an illustration to a step or section. In many cases, a sample illustration is provided for your reference; you *must* replace it with an illustration specific to your device.

Example:

Illustration suggestion (Delete this suggestion when completed): This is a sample of an illustration suggestion. Once you've considered and acted on the information in the suggestion, triple-click to select the entire paragraph, then press Backspace or Delete to remove it from the chapter.

Before you begin

Before you begin creating documentation for your product, review the conceptual overview provided in this instructional guide to identify the procedures for building documentation. Once you've reviewed this, you can begin building documentation using the step-by-step instructions in "Building documentation for your Palm OS device" on page x. To build documentation, these basic steps are required:

- Make a copy of the master documentation files and place them on your hard drive.
- Rename the book file to a name specific to your product.
- Assign definitions to variables within the chapters.
- Read and edit the documentation to customize it for your product.
- Create cross-references as needed.
- Create additional index entries, if desired.
- Make any desired cosmetic changes, such as changing fonts or adjusting paragraph styles.
- Generate a book file to compile your book and all the changes.

Contents of the End-User Documentation Kit

The End-User Documentation Kit consists of several individual FrameMaker files related to Palm OS software operating procedures and applications. Depending on the requirements of your Palm OS device, you might use some or all of the chapters. The chapter names and a brief description of each is provided below.

- **00Front.fm** is the title page of your publication name and the copyright page.
- **MasterTOC.fm** contains the master table of contents, regenerated each time the book file is generated/updated.
- **00About**, Provides a brief introduction to this guide.
- **01Intro.fm**, Chapter 1, introduces your device, provides system requirements for desktop software (if applicable), and discusses basic elements of the user interface. In addition, information about opening applications, entering data, and using Graffiti writing is included.
- **02Data.fm**, Chapter 2, shows you how to enter data in four ways: with the stylus or the onscreen keyboard; and if applicable, with the computer keyboard, or by importing data from another application.
- **03Manag.fm**, Chapter 3, provides information about how to manage and categorize applications on your device, and how to add applications to your device.
- **04Apps.fm**, Chapter 4, is the introductory page to the applications chapter. Any application your device includes follows the information in this chapter and appears to be part of this chapter. Individual application filenames are preceded by an exclamation point (!) and automatically fall into place after the introductory information in this section.
- **!Datebook.fm** is the Date Book application chapter.
- **!Address.fm** is the Address application chapter.
- **!Todolist.fm** is the To Do List application chapter.
- **!Memopad.fm** is the Memo Pad application chapter
- **!Calcu.fm** is the Calculator application chapter.
- **!Expense.fm** is the Expense application chapter.

- **!WebClip.fm** explains how to use web clipping to receive web content on your device.
- **!SMS.fm** explains how to send and retrieve Short Messaging Servicing (SMS) messages via a mobile phone.
- **05Attention.fm**, Chapter 5, describes the Attention Manager, and how you use it to manage all notifications in one place.
- **06ExpCard.fm**, Chapter 6, describes how to use an expansion card on your device. Tasks such as displaying contents, and beaming and deleting applications are discussed.
- **07Phone.fm**, Chapter 7, explains how to connect your device to a GSM mobile phone for wireless communication.
- **08Tasks.fm**, Chapter 8, describes tasks common to all basic Palm OS applications. Because your device might not use all the applications, you must read and edit this chapter to reference only the applications used by your device.
- **09Mail.fm**, Chapter 9, describes the Palm OS mail application.
- **10Beam.fm**, Chapter 10, describes how to beam information from one device to another, including the Short Message Servicing (SMS) feature.
- **11HotSync.fm**, Chapter 11, describes how HotSync® exchanges and updates information between your device and your computer's desktop.
- **12Connect.fm**, Chapter 12, describes preferences options for your modem and network.
- **13Maint.fm**, Chapter 13, is created by you, the device manufacturer. Use this chapter to describe how to maintain the device, for example, when to change batteries, how to clean it, and so forth. As this is an optional chapter, you can delete it from the book file if desired.
- **14faq.fm**, Chapter 14, is created by you, the device manufacturer. Use this chapter for Frequently Asked Questions, troubleshooting, etc. This is an optional chapter; you can delete it from the book file if desired.
- **MasterIX.fm** is the master index chapter. Each time an index marker is added and the book file is generated/updated, the index is updated. As a general rule, update individual markers within the chapters of the book to correct the index;

if you correct the index file directly and then generate/
update the book file, any edits made previously are lost.

Document statistics

The Adobe FrameMaker files supplied with the End-User Documentation Kit have default document control values for page size, fonts, and so forth. You can change these default values for your documentation; however, be sure to import the settings into every chapter for consistency. The defaults are:

- Page Size: 8-1/2 inches by 11 inches.
- Smart Quotes and Smart Spaces options turned on in Text Options.
- Variables: Generic variables, which you change to make specific to your product. See "Step 5: Define variables" on page xiv for information about how to define variables.
- Cross-references: All cross-references are disabled and displayed in **magenta** text. Depending on your needs, either delete the cross-references or make them active.
- Styles: A definition of all the styles used in the End-User Documentation Kit is provided in the folder `Template_Book_Annotated`. You can change the styles if you want; however, be sure to use the `File > Import > Formats` command to update the style changes in all the files.
- Graphics: In many cases, screenshots are provided (copied into the documents) as samples. You *must* replace these samples with screenshots specific to your device, as they are samples only.

Building documentation for your Palm OS device

Once you've reviewed the introductory information and installed the necessary software, you are ready to begin building documentation for your product. There are eight basic steps required to create a documentation set.

Step 1: Make a copy of the master documentation files

To begin the process of creating documentation for your device, copy the master documentation files onto your hard drive.

After copying the master documentation onto your hard drive, rename the master book file to a name specific to your product.

To create a set of master files for your device:

1. Open the End User Docs folder on the Product Development Kit (PDK) CD and locate the Master Docs folder.
2. Copy the Master Docs folder onto your hard drive. This folder contains all the files and graphics you need for your documentation.
3. Rename the Master Docs folder to a name appropriate to your product.

To rename the master book file:

1. Open the folder you renamed in the previous step and locate the *Master.book* file.
2. Rename the *Master.book* file with a name appropriate to your product.

At this point, you open the renamed book file and begin editing the files to create a set of documentation for your product.

NOTE: For purposes of this instructional guide, the newly named book file is referred to as *Master2.book*, but you may use any name you wish.

Step 2: Verify the documentation files

Before continuing, take a moment to open your new book file and verify that the chapters are accessible from the book file.

To open the book file:

1. Open your renamed book file. For instance, you might have renamed the book file *Master2.book*.

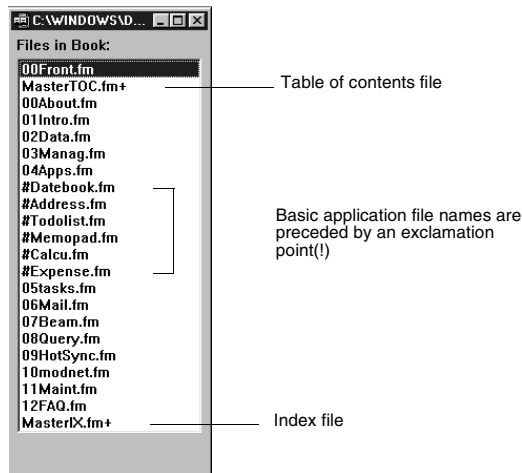
The *Master2.book* file contains a list of references to all the files used to create a set of documentation. Note that the basic applications

Instructional Guide: End-User Documentation Kit for Palm OS® 5

Building documentation for your Palm OS device

chapters are preceded by an exclamation point (!) to differentiate them from other chapters.

In addition, you'll notice that the table of contents (MasterTOC.fm) and index (MasterIX.fm) retain the same prefix as the original book file's name. However, they will generate properly within your new book file, so there is no need to rename them.



2. Double-click any file name within the list of files. (The purpose of this step is to familiarize you with the way the files look onscreen.)

TIP: Leave the book file open in FrameMaker to make all files easily accessible rather than having to choose File > Open each time you want to open a file.

Step 3: Remove unused basic application files

Next, edit the book file to remove the basic applications files that your device does not use. The basic application files are preceded by an exclamation point (!).

NOTE: If your device uses all the basic applications, skip this step.

To delete unused files from the book file:

1. Make sure the book file is open; then choose File > Rearrange Files.
2. Highlight an application chapter (a chapter preceded by an exclamation point (!)) that you want to remove.
3. Click Delete to remove the reference to the basic application chapter from the book file.
4. Repeat steps 2 and 3 to remove any other unused basic application chapters.
5. Click Done when you've deleted all the desired files.
6. Choose File > Save to save the changes to the book file.
7. When you delete a file name from the book file, you delete only a reference to the file, not the actual file.

NOTE: If you delete a file mistakenly, close the book file without saving changes; then reopen it and use the File > Rearrange command to start the deletion process again.

Step 4: Generate and update the book file

This step generates all the files in the book file and repaginates the chapters throughout the book. If you did not delete any of the basic application chapters from the book file, go on to "Step 5: Define variables."

To update/generate a book file:

1. Make sure the book file is open in FrameMaker.
2. Choose File > Generate Book.
3. In the Generate/Update Book dialog box, make sure that MasterTOC.fm and MasterIX.fm are displayed in the Generate list box.
4. Click Update.
5. The book file is updated and repaginated.

6. If error messages appear or the book file does not generate successfully, use the troubleshooting tips below to help you solve the problem.
7. Regenerate the book file after correcting the problem.

Troubleshooting tips for book files

Try these tips to solve book file problems:

- If you're working on various platforms, for example, on both a PC and a Macintosh, and the fonts differ from the original platform, you must open each file individually, accept the font substitution, and save the file. You cannot generate a book file successfully until you update or install the correct fonts on your system.
- Make sure all referenced files are in the correct location. An error message appears ("Can't Open filename.fm) and the book stops generating if the book file can't find referenced files. Files can't be found if you move them and they are not in the expected location.
- Resolve any unresolved cross-references. When unresolved cross-references are found while generating a book file, a message appears after the file is generated, indicating in which chapters they occurred. To solve the problem, open the chapter containing the unresolved cross-references, choose Edit > Find/Change, and choose Unresolved Cross-References from the Find pop-up menu. Find and resolve the cross references.

Step 5: Define variables

Variables are generic placeholders for specific information. In the End-User Documentation Kit, default values have been assigned to variables, which you will edit to customize them for use with your product. Note that all default variable definitions are displayed in **red**, which makes them easy to identify within the body of the document.

In these examples, the variable name is in parentheses, followed by the definition:

Variable name	Definition
(Product Company Name)	Palm
(ProductName)	Palm V
(Product Type Short)	handheld
(Product Type Long)	handheld computer

To assign a definition to a variable:

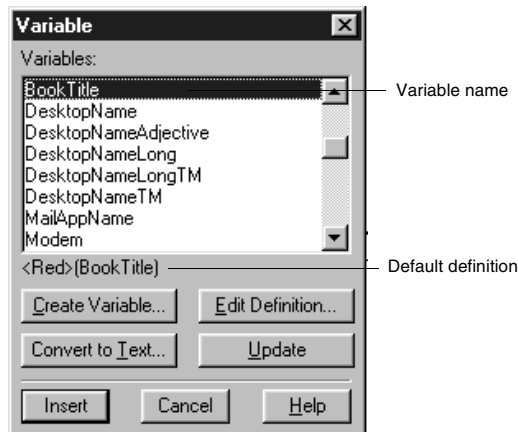
1. Open a chapter from your book file.
Note that while you can open any chapter for this step, not all the chapters use all the variable definitions. For example, the front matter chapter, 00front.fm, uses only a few of the variables, so you may want to open a chapter that contains all or most variables, such as 01Intro.fm.
2. Choose Special > Variable.
3. The top portion of the Variable dialog box displays the list of default system variables, followed by Palm OS book and product variables. The Palm OS book and product variables begin at the "BookTitle" entry and are preceded by "<Red>" to indicate that the default variable is displayed within the documents in red.

IMPORTANT: You *must* provide a definition for each Palm OS variable in the list, even if it is not used in every chapter. If you do not, you run the risk of displaying a generic variable definition in red within the body of the chapter.

4. Select the first Palm OS variable in the list, "Book Title." The default definition, <Red> (Book Title) appears below the list of variable names.

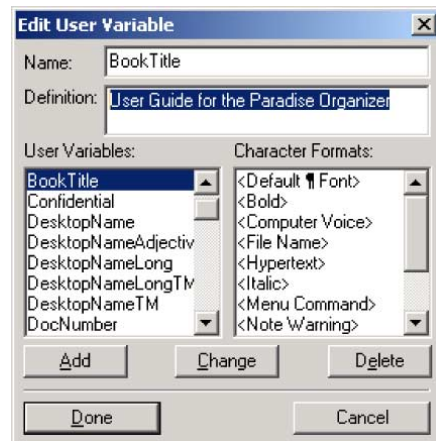
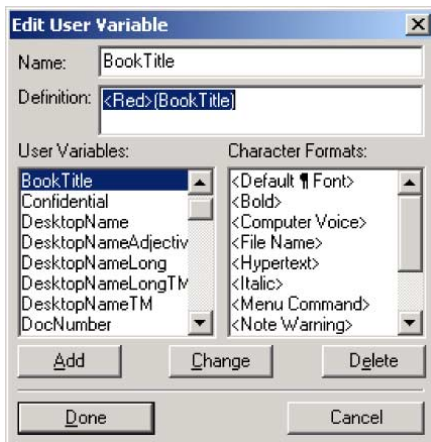
Instructional Guide: End-User Documentation Kit for Palm OS® 5

Building documentation for your Palm OS device



5. Click Edit Definition. In the Definition field, enter your book's title.

In this example, the default book title is changed to "User Guide for the Paradise Organizer."



6. Select the next variable in the User Variables section of the dialog box; then change the definition. Repeat this step until all the Palm OS variables are defined.

7. Click Done to exit the Edit User Variable dialog box. Click Done again to exit the Variable dialog box.

IMPORTANT: Be sure to supply a definition for each variable in the list, even if you do not know if the variable is used within the chapters of your documentation. If you do not provide a definition, and the variable should appear within the chapter, the generic variable value is displayed in red within the chapter.

8. Choose File > Save to save the book file.
Be sure to save the book file whenever you make changes to it.

Reference: Table of End-User Documentation Kit Variables

For your reference, a table of all the variables, including Palm OS end-user documentation kit and default system variables, is provided below. Default system variables are followed by an (s).

Variable	Definition
Book Title	Book title
DesktopFolderMacintosh	Folder on the Macintosh containing device desktop software, for example, Palm
DesktopName	Device desktop software, for example, Palm Desktop software
DesktopName Adjective	Device desktop, for example, Palm Desktop
DesktopNameLong	Device Desktop device software, for example Palm Desktop device software
DesktopNameLongTM	Device desktop device software including a trademark symbol (™) for example Palm™ Desktop device software
DesktopNameTM	Device Desktop software including a trademark symbol (™), for example Desktop software

Instructional Guide: End-User Documentation Kit for Palm OS® 5

Building documentation for your Palm OS device

MailAppName	Mail application name
Modem	Device modem accessory, for example, Palm Modem accessory
ModemTM	Device modem accessory with trademark symbol (™), for example, Palm Modem™ accessory
Operating System Macintosh	Macintosh operating system
OperatingSystem	Applicable operating system
OperatingSystem PC	operating system PC
Product Description	Product description
ProductCompanyName	Product company name
ProductCorp	Product corporation (if necessary)
ProductName	Product name; for example, Palm V
ProductNameGeneric	Product name generic, for example, organizer
ProductNameTM	Product name with trademark, for example Palm V™
ProductOS	Product operating system
ProductPrevious	previous version of product (not applicable if first release)
ProductTypeLong	product type, adjective and noun, for example, handheld computer
ProductTypeShort	Device type, lower case, for example, organizer
ProductTypeShortUpper	Device type, upper case, for example, Organizer
WebCorpLong	Web corp long, for example, http://www.name.com
WebCorpShort	Web corp short, for example: name.com
WebProdNetLong	Web prod net long, for ex: http://www.name.net
WebProdNetShort	Web prod net short, for ex: name.net
WebProductLong	Web product long, for ex: http://www.devicename.com
WebProductShort	WebProductShort, if applicable, for example: device.com

Page Count (S)	Displays the page number of the page on which the variable is displayed.
Current Date (Long) (S)	Example: November 11, 1999
Current Date (Short) (S)	Example: 11/8/99
Modification Date (Long) (S)	Example: November 9, 1999 11:57 am
Modification Date (Short) (S)	Example: 11/8/99
Creation Date (Long) (S)	Example: October 28, 1999
Creation Date (Short) (S)	Example: 10/28/99
Filename (Long) (S)	Example: C:\TechPubs\DocSet\EndUserKit.fm
Filename (Short) (S)	Example: EndUserKit.fm
Table Continuation (S)	In a multipage document, lets you display continuation text in the title or heading or footing rows. Use Table Continuation and Table Sheet for this purpose.
Table Sheet (S)	In a multipage document, lets you display continuation text in the title or heading or footing rows. Use Table Continuation and Table Sheet for this purpose.

Step 6: Import the variable definitions into all chapters

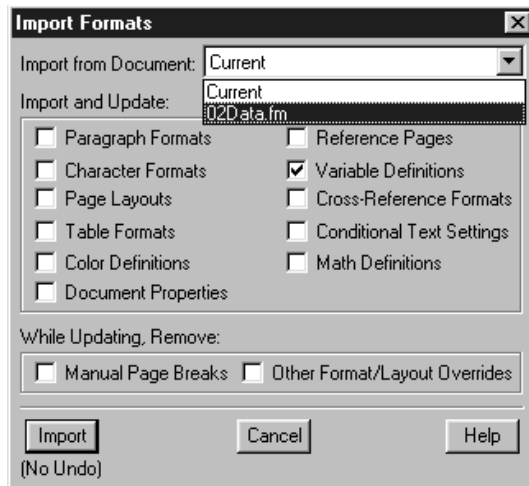
Once you have defined the Palm OS variables in a single chapter file, you import them into all the remaining chapters in the book file (with the exception of the table of contents and the index).

1. Make sure that the chapter containing the variable definitions is open in FrameMaker. (You can minimize the document if desired.)
2. Open a chapter in which the variables have not been defined.
3. From the open chapter with no variables defined, choose File > Import > Formats.

Instructional Guide: End-User Documentation Kit for Palm OS® 5

Building documentation for your Palm OS device

4. In the Import Formats dialog box, from the Import from Document menu, choose the document name that contains variable definitions.



5. In the Import and Update area of the dialog box, make sure that the Variable Definitions option is selected. Deselect all the other options in the Import Formats dialog box.

NOTE: If you later change other formats, such as Paragraph or Character formats, or the Page Layout definitions for a document, you can use other options in the Import Formats dialog box to update all the chapters in your documentation.

6. Click Import to import the variable definitions.
7. Repeat steps 2-6 for all remaining chapters.

Step 7: Define cross-references

By default, all the cross-references in the End-User Documentation Kit are disabled and are displayed in magenta. You can make a cross-reference active by selecting it, choosing Cross-Reference from the Special menu, and then redefining it. If you do not want to use a cross-reference, you can delete it from the chapter.

This guide assumes that you know how to define and insert cross-references using Adobe FrameMaker. If you don't know how to create a cross reference, see your Adobe FrameMaker 5.5 documentation or on-line help.

Step 8: Update and generate the book file

Once you have created your book file, identified which chapters you want to use, assigned variables and cross-references, and made any other desired modifications, update your book file to incorporate all the changes you've made.

To update/generate your book file:

Open your book file; then choose File > Generate/Update. If the book file does not generate properly, see "Troubleshooting tips for book files" on page xiv.

Instructional Guide: End-User Documentation Kit for Palm OS® 5

Building documentation for your Palm OS device
